

## **Call for offers for the consultancy services “Study of environmental responsibility of small and medium enterprises (SME), Call 1”**

**in scope of the LIFE project “Baltic pilot cases on reduction of emissions by substitution of hazardous chemicals and resource efficiency” (LIFE Fit for REACH), Nr. LIFE14 ENV/LV/000174).**

### **1 Title of the Contract**

Consultancy Services for study on environmental responsibility of small and medium enterprises (SME)

### **2 Purpose and context of the Contract**

The purpose of this call is to award a contract for the provision of services as described in Annex A.1 Technical Specifications. The contract will be made with the service provider with the most **economically advantageous** offer.

### **3 Subject of Contract**

Development of methodology of a study on the environmental responsibility of SME (including survey) and analysis of the results of the survey.

### **4 Technical Specifications**

The Technical specifications are outlined in the Annex I.

### **5 Starting of the Contract and duration**

The Contract resulting from the present call shall enter into force the date on which it is signed by the Contractor, expected date no later than 15 January 2018. The study addressed hereto consists of 3 parts, and 2 of them included in this call:

Part 1: **Elaboration of the methodological proposal for sociological survey:** the results shall be submitted by 15 March 2018.

Part 2: Sociological survey of Baltic SME (not included in this call: additional call will be organised), April-May, 2018.

Part 3: **Analysis and presentation of the survey results:** the evaluation of the result shall be submitted within three weeks after the finalisation of the survey (procured separately, see Part 2) preliminary by June 30, 2018. The presentation of the results at the workshop in the October, 2018.

### **6 Participation in the Call for offers**

Participation in this call is open on equal terms to all legal Persons complying with selection criteria.

### **7 Volume of the Contract**

The volume of the Contract shall not exceed 8 000,00 EUR (including VAT). Prices shall be expressed in euro including all taxes (including VAT). Prices shall be fixed and not subject to revision. The Contractor shall not reimburse expenses incurred in preparing and submitting offers.

### **8 Place of performance**

The place of performance of the tasks shall be the premises of the service provider.

### **9 Date and place of opening of the Call for offers**

Call will be opened at 19 December 2017. The proposals shall be submitted by e-mail (info(at)ekodizains.org) by 10 January 2017.

### **10 Evaluation of the offers**

The offer shall include (see Template, Annex II)

- 1) outline (2 or more pages) how the study on Baltic SME will be performed,
- 2) price offer for total services including VAT according to Technical specification including honorary and travel costs for instructing 3 survey implementers (in Latvia, Estonia, Lithuania, if necessary) and workshop in October (Latvia or other Baltic States),
- 3) documents providing information needed for the evaluation of offer as announced hereto.

The evaluation team of this “Call for offers” will consist of representatives from 3 organisations - partners of the LIFE Fit for REACH project – Ecodesign Competence Centre (Latvia), Baltic Environmental Forum - Lithuania and Baltic Environmental Forum - Estonia (more information about the project (<http://fitreach.eu>)).

### **11 Selection criteria**

Service providers will be selected if they can prove that they have technical and professional capacity:

1. Main experts have masters’ or doctoral degree in sociological research or related areas e.g. humanities, psychology, anthropology, economics, politics (CVs of the person or persons responsible for providing the services must provide information on education, work experience, language skills).

2. Main experts have participated in similar studies e.g. surveys, sociological research on behaviour of market actors, enterprises etc, or have developed methodology for such studies (proof shall be submitted e.g. references with contacts),
3. Main experts are able to work in English language (all reports shall be written in English).

## 12 Award Criteria

The most economically advantageous offer will be awarded with the contract. Offers will be evaluated on the basis of the following award criteria:

Name of criterion	Explanation of criterion	Value
Price, CP	Price of the offer, incl. VAT	5 p
Quality, CQ	Quality of the study outline incl. references used, attention to details and precision	5 p
Experience, E	Contribution to development of methodology or implementation of qualitative or quantitative studies related to the research announced hereto: Environmental behaviour of the market actors (2,5 p) Behaviour of enterprises (2,5 p)	5 p

Value of criterion "Price" will be calculated as follows:

$$CPx = P_{min} / P_x * 10$$

$P_x$  - Price offered by current bidder in evaluation, Euro

$P_{min}$  - smallest price offered by bidders of this call for offers, Euro.

$CPx$  - points given to the current bidder.

## 13 Contracting parties

The contracting parties for this consultancy service are Ecodesign Competence Centre (Latvia), Baltic Environmental Forum Lithuania and Baltic Environmental Forum Estonia.

## 14 Contacts:

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## **Annex I. Technical specifications for Consulting services for study on environmental responsibility of SME enterprises**

Service provider shall propose methodology in order to carry out survey (including direct interviews) on environmental responsibility of SME's in Estonia, Latvia and Lithuania and analyse the results of the survey with providing insight into the following questions:

- What are SME's attitudes towards environmental corporate responsibility?
- Do SME's identify their environmental impacts (internally, externally), how?
- Do SME's have internal policy? What is their motivation behind establishing such policy?
- How important for SMEs are issues related to hazardous substances (in occupational health, consumer health, environment protection)?
- Do SMEs have environmental corporate identity? How do they develop it - intentionally or unintentionally, what expertise they have and what they are lacking? How do they achieve it, what elements and tools do they use? Does such identity has market advantage? How they access it? How important are hazardous substances with regard to environmental corporate identity?
- What elements they use to promote their environmental corporate identity? What are green PR and marketing strategies?
- What types of environmental claims and elements of environmental corporate identity companies use to promote their image/ products? What, from company's point of view, are most efficient tools? Why?
- What could be the driving forces, efficient measures to promote environmental corporate responsibility, especially, with regard to phasing out of hazardous substances and other activities to increase environmental performance in industry?
- How they measure their environmental impacts?

The study will consist of 3 parts:

### **1.Part Elaboration of methodological proposal.**

Service provider shall propose methodology in order to carry out study on environmental responsibility of SME in Estonia, Latvia and Lithuania, including survey approach, and analysis of results of the survey.

The methodology proposal for study shall include:

1. Main assumptions based on literature review, including reports from projects on similar studies.
2. The design of the survey (methods, evaluation, reason for design) for following SME's:
  1. Household chemicals (household cleaning agents) producers
  2. Construction chemicals (paints and varnishes) producers
  3. Textile producers
  4. Metal Processing companies
  5. Food products producers (canned food).
  6. Furniture producers
  7. Construction companies.
3. Instruction needs for the survey providers, will be carried out by the contractor (on environmental corporate policy) and the service provider (on survey methodology).
4. Costs associated with the survey (detailed breakdown) and quantitative indicators e.g. Nr. of companies surveyed).

The proposed methods for the survey shall include, amongst others, direct interviews of companies (managers, sales, HSE managers).

## **2.Part. Survey of Baltic SME (not part of this contract).**

The study survey will be contracted via additional tenders by Contractor, and it must be carried out in Estonia, Latvia, and Lithuania. The total expenditures foreseen for the field research shall not exceed 22 000 Euros (including all taxes). The Service provider shall instruct the experts of the survey in each country, a travel budget shall be foreseen in offer.

## **3. Part. Assessment and presentation of the field work results.**

- Assessment of the survey results (preliminary date – June 2018 ) e.g. comparative report in good English language containing introduction, literature overview, methodology and evaluation.
- Presentation of the results of the study at the international workshop (October 2018, in Latvia), in English, incl. written thesis or slides.

The Contract provider shall elaborate methodological proposal for study incl. theoretical parts, survey methodology and costs, total costs of service provided e.g. days of expert for each action, expert fees and additional costs e.g. travel in Baltic States if necessary.

**Terminology used:**

The environmental aspect of corporate social responsibility or so called **Corporate Environmental Responsibility (CER)** is defined as the duty to abstain, reduce and cover the environmental implications of the company's operations, products and facilities; eliminate waste and emissions; maximize the efficiency and productivity of its resources; and minimize practices that might adversely affect the enjoyment of the country's resources by future generations.

A **corporate identity** or **corporate image** is the manner which a corporation, firm or business presents themselves to the public (such as customers and investors as well as employees). Corporate identity is a primary goal of the corporate communications, for the purpose to maintain and build the identity to accord with and facilitate the corporate business objectives. The corporate identity is typically visualized by way of branding and the use of trademarks, but it can also include things like product design, advertising, public relations etc.

**Environmental claim:** the expressions "environmental claims" or "green claims" refer to the practice of suggesting or otherwise creating the impression (in the context of a commercial communication, marketing or advertising) that a product or a service, is environmentally friendly (i.e. it has a positive impact on the environment) or is less damaging to the environment than competing goods or services.

**Hazardous substances** refer to substances, which are classified as toxic or harmful to human health or environment, very persistent and very bioaccumulative.

**SME** -the category of micro, small and medium-sized enterprises (**SME**) is made up of enterprises which employ fewer than 250 persons and which have an annual turnover not exceeding 50 million euro, and/or an annual balance sheet total not exceeding 43 million euro.

[Template]

**Call for offers Nr. CO - 01-12-2017 for the consultancy services “Study of environmental responsibility of small and medium enterprises (SME), Call 1”**

[Place, Date] .....

Name of the bidder:	
Requisite:	
Contactperson: (name, position, e-mail, phone)	

Herewith we apply to call for offers “**Study of environmental responsibility of small and medium enterprises (SME), Call 1**” and hereby certify that:

- 1) the requirements of the technical specification are understandable and the services will be fulfilled;
- 3) the services will be completed within the specified time limits;
- 4) after the expiry of the deadline for submission of applications, our application will not be amended;
- 5) our main experts are able to work in English incl. submission of reports;
- 6) we confirm that all the information provided in the offer is true.

The lump sum of the service we offer (including all taxes e.g. VAT):	
Names of the main expert (s):	
References from 2 previous works (name of organisation, contact person, phone, e-mail):	

Please, find attached:

- Draft outline of the research (2 pages or more)
- CV of the main experts

Signature \_\_\_\_\_

Name, Surname: \_\_\_\_\_

Position: \_\_\_\_\_